

Business Analytics for Management & More

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Many Questions....

Who are our best prospects?

How did we compare to last year?

How can we measure our performance?

Are we on track with our annual plan?

Where will we end up this year?

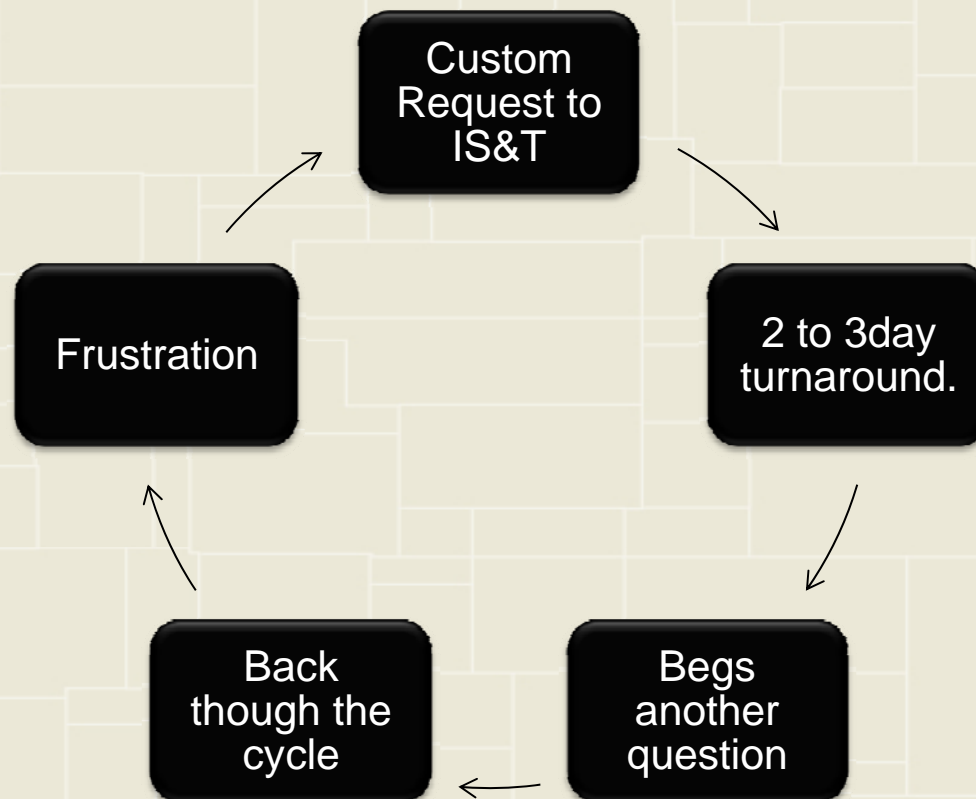
Were those proposals in the annual plan?

Who made that large gift in....?



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Never Ending "Cycle of Pain"



Static Reporting

AWA Report
Emory Confidential

DAR Development Activity Management
Quarterly Review and Strategic Planner as of 1/31/2010
HS ROLLINS SCHOOL OF PUBLIC HEALTH

Report Date: 2/8/2010
Page 1 of 9

0000205144

Development Officer Summary

	Goals & Expectations		Actuals				Totals	
	Annual Goal AMT CNT		First Quarter AMT CNT	Second Quarter AMT CNT	Third Quarter AMT CNT	Fourth Quarter AMT CNT	Percentage of Goal	Year-to-Date Totals AMT CNT
Gift & Pledge Expectations	\$3,053,500		\$2,005,747	\$14,624	\$0	\$0	66.2%	\$2,020,371
Annual Proposal Activity		24	\$5,000,000	3	\$0	0	12.5%	\$5,000,000 3
Personal Visits		144		41	17	0	40.3%	58

Details

	Annual Gift/Pledge Expectations	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	Percentage of Goal	Year-to-Date Totals
Current FY New Gifts		\$0	\$14,624	\$0	\$0		\$14,624
Current FY New Pledges		\$2,005,747	\$0	\$0	\$0		\$2,005,747
	\$3,053,500	\$2,005,747	\$14,624	\$0	\$0	66.2%	\$2,020,371

Proposal Activity	Expected Solicitations Goal Counts	First Quarter AMT CNT	Second Quarter AMT CNT	Third Quarter AMT CNT	Fourth Quarter AMT CNT	Percentage of Goal	Year-to-Date Totals AMT CNT
\$5,000,000 +	1	\$0 0	\$0 0	\$0 0	\$0 0	0.0%	\$0 0
\$1,000,000-4,999,999	0	\$5,000,000 3	\$0 0	\$0 0	\$0 0	0.0%	\$5,000,000 3
\$500,000-999,999	0	\$0 0	\$0 0	\$0 0	\$0 0	0.0%	\$0 0
\$250,000-499,999	0	\$0 0	\$0 0	\$0 0	\$0 0	0.0%	\$0 0
\$100,000-249,999	3	\$0 0	\$0 0	\$0 0	\$0 0	0.0%	\$0 0
\$50,000-99,999	1	\$0 0	\$0 0	\$0 0	\$0 0	0.0%	\$0 0
\$25,000-49,999	1	\$0 0	\$0 0	\$0 0	\$0 0	0.0%	\$0 0
\$10,000-24,999	18	\$0 0	\$0 0	\$0 0	\$0 0	0.0%	\$0 0
\$5,000-9,999	0	\$0 0	\$0 0	\$0 0	\$0 0	0.0%	\$0 0
\$1,000-4,999	0	\$0 0	\$0 0	\$0 0	\$0 0	0.0%	\$0 0
\$1-999	0	\$0 0	\$0 0	\$0 0	\$0 0	0.0%	\$0 0
		\$5,000,000 3	\$0 0	\$0 0	\$0 0	12.5%	\$5,000,000 3



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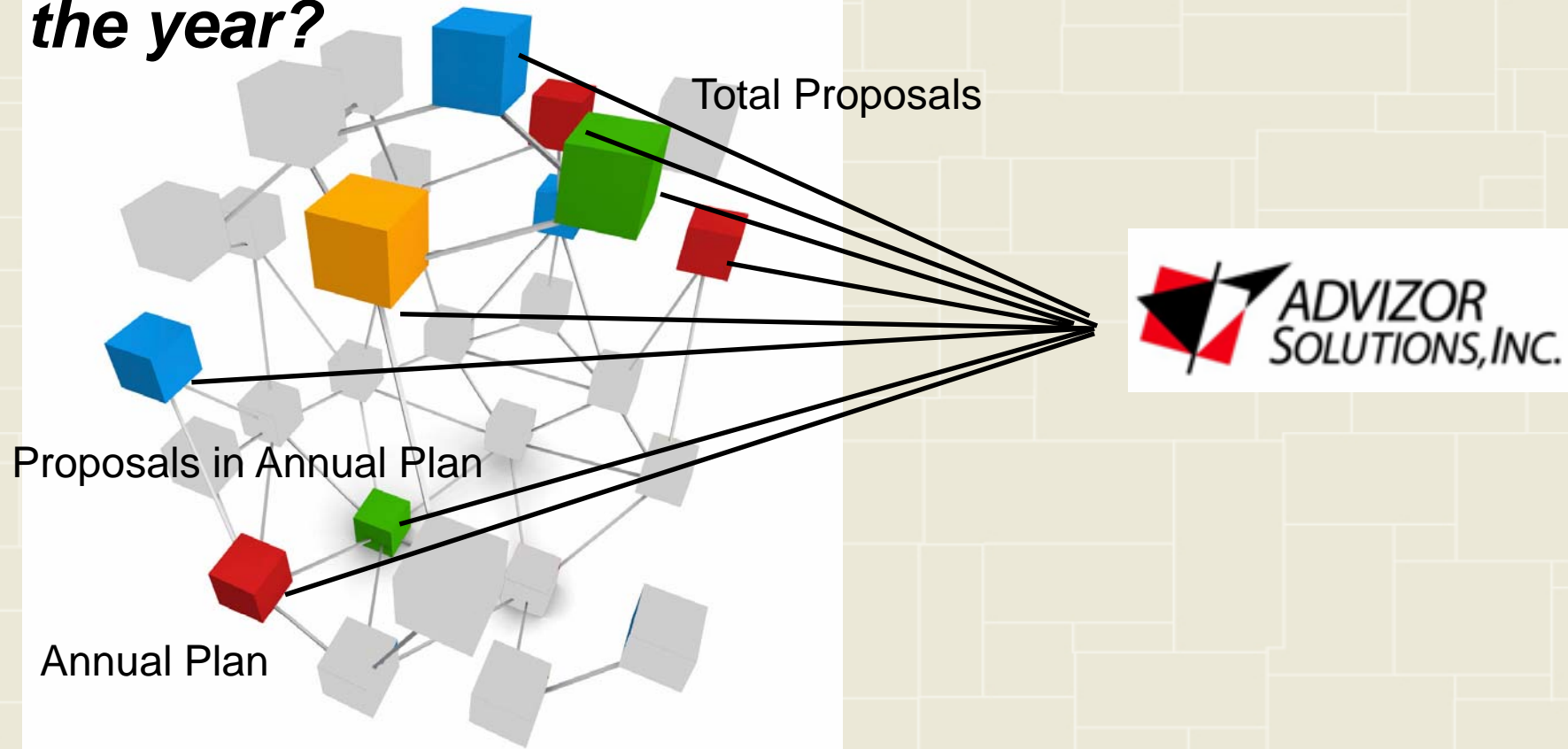
Visual & Static Reporting



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Interactive & Visual

Q: Where do we stand in our annual plan and for the year?



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Demo:

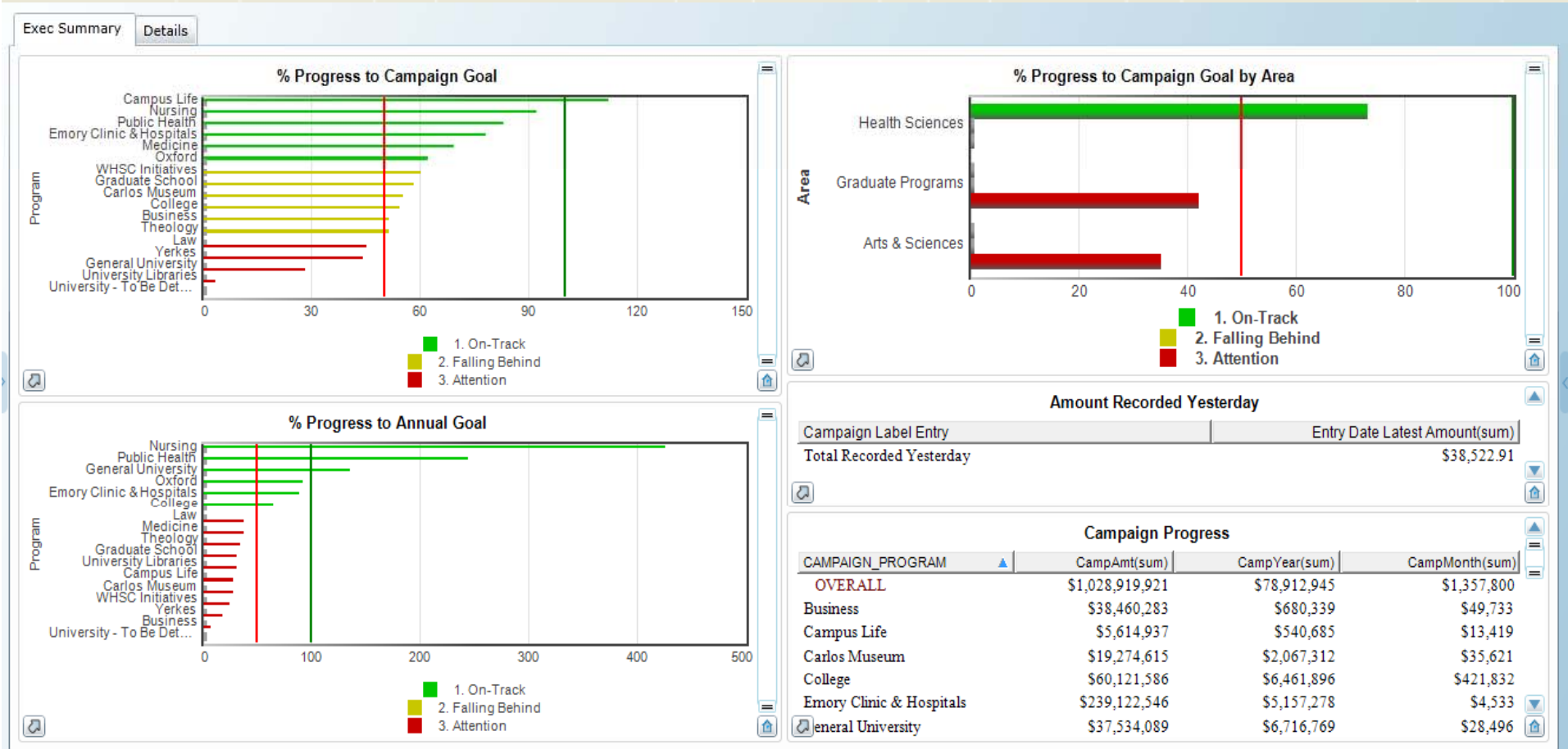
Campaign Dashboard

(disguised data)



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Top level view to highlight progress within Campaign.



Advisor Solutions, Inc.



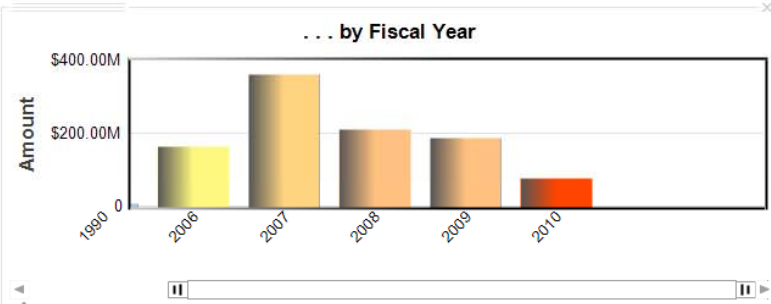
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Next level detail.

Exec Summary | Details

Raised by Use

CAMPAIGN_USE	CampAmt(sum)
OVERALL	\$1,009,962,930
Capital	\$313,173,046
Endowment	\$165,715,236
Expendable	\$531,074,648

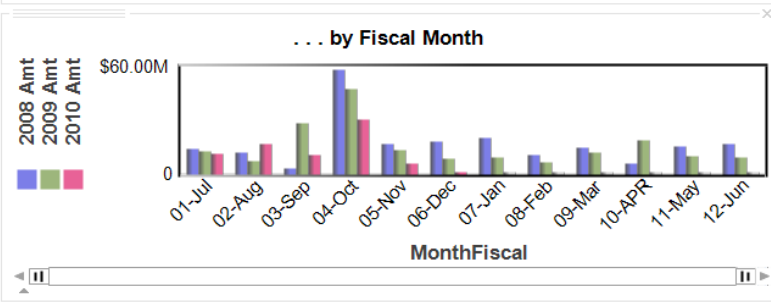


Transactions by Date of Record

DATE_OF_RECORD	ID_NUMBER	TRA...	CampAmt
11/7/2006	0000100966	PL	\$109,999,932
12/15/2006	0000100966	PP	\$40,000,032
12/13/2007	0000100966	PP	\$35,000,003
11/7/2006	0000100966	PL	\$30,000,000
12/23/2008	0000100966	PP	\$25,000,033
7/9/2007	0000101010	SI	\$24,000,000
11/24/2008	0000288573	02	\$10,510,753
5/28/2008	0000329988	PP	\$9,133,571
12/15/2006	0000100966	PP	\$9,000,000
1/19/2007	0000288573	01	\$8,478,837

... by Purpose

CAMPAIGN_PURPOSE	CampAmt(sum)
OVERALL	\$1,009,962,930
Unrestricted	\$56,481,944
Program Support	\$505,195,168
Student Support	\$61,077,665
Capital Support	\$313,173,046
Faculty Support	\$74,035,108

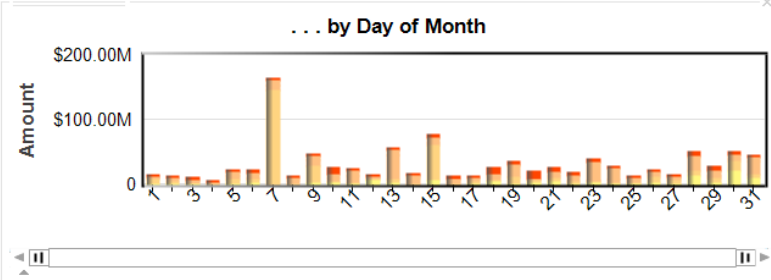


Allocation

ALLOC_LONG_NAME	CampAmt(sum)
OVERALL	\$1,009,962,930
Clifton Road Redevelopment Project	\$210,000,000
Rollins School of Public Health Expansion	\$52,576,709
Clifton Road Redevelopment Project - School of Medicine	\$30,000,000
School of Medicine Development Strategy	\$16,821,866
Gates Foundation Fund: Koplan	\$16,476,873
Global Tobacco Technical Assistance Consortium - Obj...	\$14,000,000
Presidential Strategic Initiatives Fund	\$12,500,000
Gifts Pending Designation - Oxford College	\$11,341,847
Lettie Pate Evans Foundation Restricted Fund	\$10,617,387
Hepatitis Cure Fund: Ahmed	\$10,576,885
Gifts Pending Designation - Nursing School	\$9,825,333

... by Source

CAMPAIGN_SOURCE	CampAmt(sum)
OVERALL	\$1,009,962,930
Alumni	\$107,831,681
Corporations	\$57,136,696
Faculty & Staff	\$155,021,747
Foundations	\$447,037,928
Friends / Grateful Patients	\$127,337,003



Pland Gvng Flg

PL	CampAmt(sum)
O...	\$1,009,962,930
N	\$877,659,082
Y	\$132,303,848

Person or Org

PE	CampAmt(sum)
...	\$1,009,962,930
O	\$742,946,653
P	\$267,016,277



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Graduate Programs are generally behind.

Exec Summary Details

% Progress to Campaign Goal

Program	Progress (%)	Status
Campus Life	100	On-Track
Nursing	100	On-Track
Public Health	100	On-Track
Emory Clinic & Hospitals	100	On-Track
Medicine	100	On-Track
Oxford	100	On-Track
WHSC Initiatives	100	On-Track
Graduate School	60	Falling Behind
Carlos Museum	60	Falling Behind
College	60	Falling Behind
Business	60	Falling Behind
Theology	60	Falling Behind
Law	45	Attention
Yerkes	45	Attention
General University	30	Attention
University Libraries	30	Attention
University - To Be Det...	30	Attention

% Progress to Campaign Goal by Area

Area	Progress (%)	Status
Health Sciences	75	On-Track
Graduate Programs	45	Attention
Arts & Sciences	35	Attention

% Progress to Annual Goal

Program	Progress (%)	Status
Nursing	450	On-Track
Public Health	450	On-Track
General University	450	On-Track
Oxford	450	On-Track
Emory Clinic & Hospitals	450	On-Track
College	450	On-Track
Law	150	On-Track
Medicine	150	On-Track
Theology	150	On-Track
Graduate School	100	Falling Behind
University Libraries	100	Falling Behind
Campus Life	100	Falling Behind
Carlos Museum	100	Falling Behind
WHSC Initiatives	100	Falling Behind
Yerkes	100	Falling Behind
Business	100	Falling Behind
University - To Be Det...	100	Falling Behind

Amount Recorded Yesterday

Campaign Label Entry	Entry Date Latest Amount(sum)
Total Recorded Yesterday	\$7,688.63

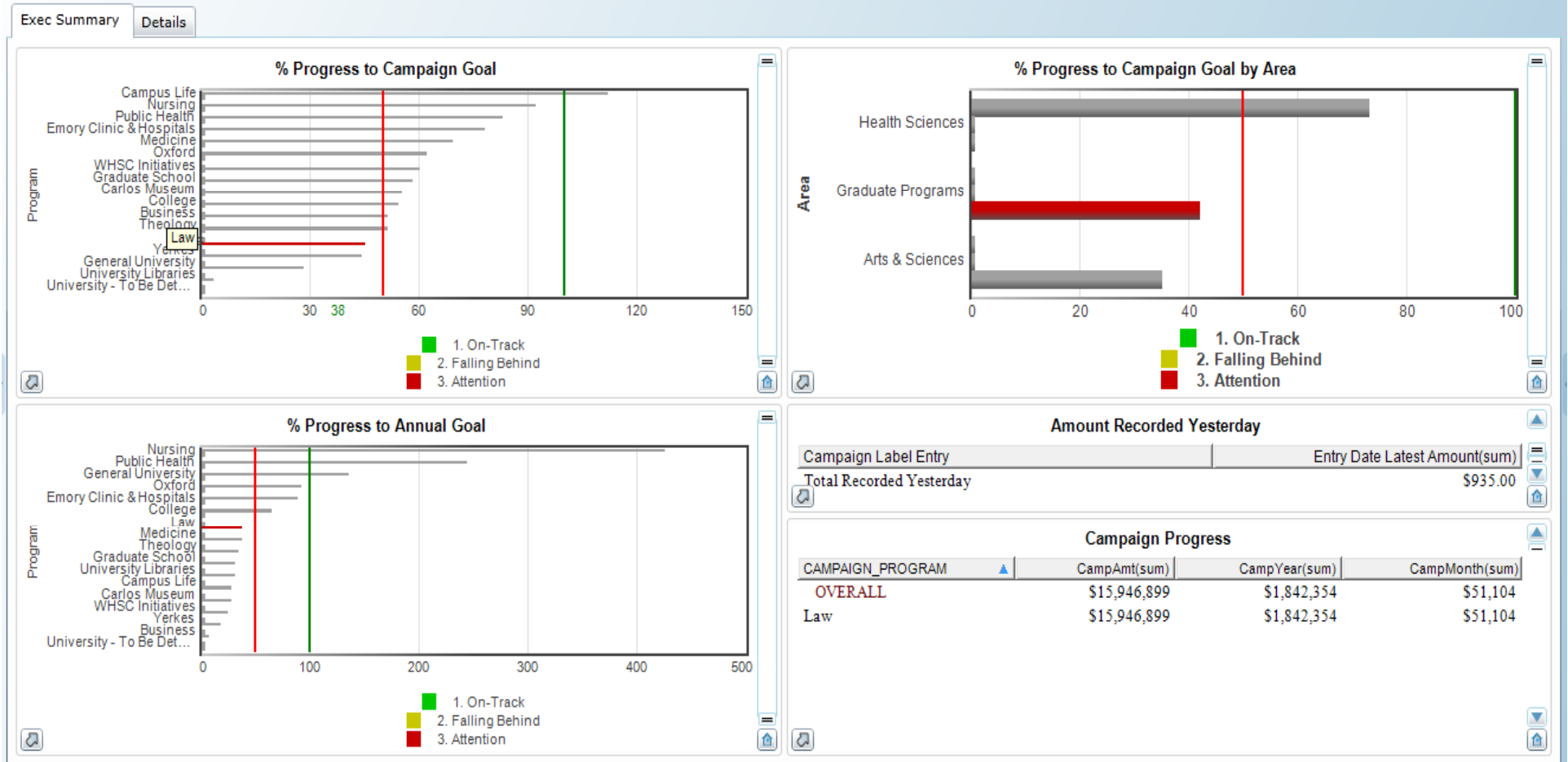
Campaign Progress

CAMPAIGN_PROGRAM	CampAmt(sum)	CampYear(sum)	CampMonth(sum)
OVERALL	\$97,995,328	\$12,202,116	\$113,442
Business	\$4,984,487	\$500	\$0
General University	\$37,534,089	\$6,716,769	\$28,496
Graduate School	\$5,879,469	\$606,797	\$13,744
Law	\$15,946,899	\$1,842,354	\$51,104
Theology	\$31,133,465	\$3,019,126	\$20,097
University - To Be Determined	\$2,516,919	\$16,570	\$0



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Law School is way off.



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Next pages shows details for Law School . . . FY 2010 way off.

Exec Summary Details

Raised by Use

CAMPAIGN_USE	CampAmt(sum)
OVERALL	\$15,946,899
Capital	\$30,300
Endowment	\$4,484,505
Expendable	\$11,432,094

... by Fiscal Year

Transactions by Date of Record

DATE_OF...	PREF_MAIL_NAME	CampAmt	TRAN...
11/24/2009	Patricia Dwinell...	\$1,000,000	BQ
3/31/2006	John Templeton F...	\$750,000	OA
6/19/2007	Mr. C. Robert He...	\$508,000	PL
4/19/2006	McDonald Agape...	\$500,000	PL
12/6/2006	Lilly Endowment,...	\$399,958	OI
10/25/2006	Mr. Philip Syng R...	\$339,250	BE
12/31/2008	Mr. Brent Jamieso...	\$300,000	PL
1/7/2007	Mr. Philip Svng R...	\$215,000	CR

... by Purpose

CAMPAIGN_PURPOSE	CampAmt(sum)
OVERALL	\$15,946,899
Unrestricted	\$3,105,497
Program Support	\$8,180,753
Student Support	\$4,614,325
Capital Support	\$30,300

Allocation

ALLOC_LONG_NAME	CampAmt(sum)
OVERALL	\$15,946,899
Emory Law School Fund	\$2,692,419
C. Robert Henrikson Endowed Scholarsh...	\$1,220,000
Gifts Pending Designation - Law School	\$1,180,372
Patricia C. Dwinell Butler Endowed Sch...	\$1,000,000
Templeton Foundation Fund: Witte	\$750,000
Christian Foundations of Religious Freed...	\$750,000
Turner Environmental Law Clinic	\$604,605
Barton Child Law and Policy Clinic	\$590,334
Atlanta Law School Fellows Program	\$536,350

... by Source

CAMPAIGN_SOURCE	CampAmt(sum)
OVERALL	\$15,946,899
Alumni	\$6,883,537
Corporations	\$770,611
Faculty & Staff	\$4,561,348
Foundations	\$7,805,270

... by Fiscal Month

Pland Gvng Flg

PL	CampAmt(sum)
O	\$15,946,899
N	\$13,448,144
Y	\$2,498,755

Person or Org

PE	CampAmt(sum)
O	\$15,946,899
O	\$7,995,319
P	\$7,951,580

... by Type

CAMPAIGN_TYPE	CampAmt(sum)
OVERALL	\$15,946,899
Gifts	\$10,311,460
Irrevocable Deferred Gifts	\$394,729
OSP	\$2,326,958
Liabilities Outstanding	\$2,115,247

... by Day of Month



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Select July – Jan YTD, and compare with other years.

Exec Summary Details

Raised by Use

CAMPAIGN_USE	CampAmt(sum)
OVERALL	\$10,489,078
Capital	\$800
Endowment	\$2,567,575
Expendable	\$7,920,703

... by Purpose

CAMPAIGN_PURPOSE	CampAmt(sum)
OVERALL	\$10,489,078
Unrestricted	\$1,985,101
Program Support	\$5,943,359
Student Support	\$2,550,543
Capital Support	\$800

... by Source

CAMPAIGN_SOURCE	CampAmt(sum)
OVERALL	\$10,489,078
Alumni	\$4,015,822
Corporations	\$565,326
Faculty & Staff	\$2,999,128

... by Type

CAMPAIGN_TYPE	CampAmt(sum)
OVERALL	\$10,489,078
Gifts	\$6,482,490
Irrevocable Deferred Gifts	\$305,969
OSP	\$2,139,458
Balances Outstanding	\$787,656

... by Fiscal Year

... by Fiscal Month

... by Day of Month

Transactions by Date of Record

DATE_OF...	PREF_MAIL_NAME	CampAmt	TRAN...
11/24/2009	Patricia Dwinell...	\$1,000,000	BQ
3/31/2006	John Templeton F...	\$750,000	OA
12/6/2006	Lilly Endowment,...	\$399,958	OI
10/25/2006	Mr. Philip Syng R...	\$339,250	BE
12/31/2008	Mr. Brent Jamies...	\$300,000	PL
1/7/2007	Mr. Philip Syng R...	\$215,000	CR
12/29/2006	King & Spalding...	\$200,000	GF

Allocation

ALLOC_LONG_NAME	CampAmt(sum)
OVERALL	\$10,489,078
Emory Law School Fund	\$1,619,658
Patricia C. Dwinell Butler Endowed Sc...	\$1,000,000
Gifts Pending Designation - Law School	\$930,457
Templeton Foundation Fund: Witte	\$750,000
Turner Environmental Law Clinic	\$515,675
Emory Public Interest Fund	\$434,574
Protestant Foundations of Law, Politics...	\$399,958
Center for the Interdisciplinary Study of...	\$399,748

Pland Gvng Flg

PL	CampAmt(sum)
O	\$10,489,078
N	\$8,217,693
Y	\$2,271,385

Person or Org

PE	CampAmt(sum)
O	\$10,489,078
O	\$5,888,631
P	\$4,600,447



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Law School Alumni in trouble in FY 2010.



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Law School Corporations also in trouble in FY 2010.



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Law School Faculty & Staff OK.

Exec Summary Details

Raised by Use

CAMPAIGN_USE	CampAmt(sum)
OVERALL	\$2,999,128
Endowment	\$1,086,450
Expendable	\$1,912,678

... by Fiscal Year

Transactions by Date of Record

DATE_OF...	PREF_MAIL_NAME	CampAmt	TRAN...
11/24/2009	Patricia Dwinne...	\$1,000,000	BQ
12/29/2006	King & Spalding...	\$200,000	GF
12/14/2006	Turner Foundatio...	\$105,000	PP
2/22/2006	Turner Foundatio...	\$100,000	GF
12/28/2006	Atlanta Law Scho...	\$91,000	GF
1/26/2007	L. W. Barton Fou...	\$79,634	GF
2/13/2007	L. W. Barton Fou...	\$79,634	GF
12/17/2007	Turner Foundatio...	\$70,000	nn

... by Purpose

CAMPAIGN_PURPOSE	CampAmt(sum)
OVERALL	\$2,999,128
Unrestricted	\$234,607
Program Support	\$1,593,804
Student Support	\$1,168,967
Faculty Support	\$1,750

... by Fiscal Month

Allocation

ALLOC_LONG_NAME	CampAmt(sum)
OVERALL	\$2,999,128
Patricia C. Dwinne Butler Endowed Sc...	\$1,000,000
Turner Environmental Law Clinic	\$434,050
Barton Child Law and Policy Clinic	\$331,934
Gifts Pending Designation - Law School	\$280,342
Emory Law School Fund	\$234,432
Alonzo L. McDonald Family Project on...	\$200,000
Center for the Interdisciplinary Study of...	\$108,748
Emory Public Interest Fund	\$93,578

... by Source

CAMPAIGN_SOURCE	CampAmt(sum)
OVERALL	\$2,999,128
Faculty & Staff	\$2,999,128

... by Day of Month

... by Type

CAMPAIGN_TYPE	CampAmt(sum)
OVERALL	\$2,999,128
Gifts	\$2,930,932
Irrevocable Deferred Gifts	\$596
Pledges Outstanding	\$17,600
Irrevocable Expectancies	\$50,000

Pland Gvng Flg

PL	CampAmt(sum)
O	\$2,999,128
N	\$1,948,532
Y	\$1,050,596

Person or Org

PE	CampAmt(sum)
O	\$2,999,128
O	\$2,807,755
P	\$191,373



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Let's Drill in on Annual Plans for the Law School



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Filter to just FY 2010.

Note: a lot of small solicitations outside of plan

Annual Goals Detail | Annual Goals Summary | Proposals -- Active | Proposals Portfolio View - Active | Visits - In Annual Plan | Proposals -- All | Visits - All

Solicitation Status (\$)

1. Total Planned Solicit
2. Actual Solicit
3. Ttl Amt Solicit outside Plan

Fiscal Year

Solicitations List // right click to export

EXPECTED_...	PROSPECT_I...	Staff	Ttl Expected	Ttl Solic InFY	Act Solicit	Prog	In...
8/31/2010	0000100966	Ms. Marger...	\$5,000,000	\$5,000,000	\$30,000,000	HS	0
11/30/2009	0000126345	Mrs. Gail K...	\$5,000,000	\$5,000,000	\$12,000,000	CAR	< >
2/28/2010	0000220904	Mrs. Vicki J...	\$2,750,000	\$2,750,000	<NULL>	MED	< >
11/30/2009	0000493928	Mr. Barry...	\$2,500,000	\$5,000,000	<NULL>	MED	< >
8/31/2010	0000410427	Ms. Marger...	\$2,000,000	\$5,000,000	<NULL>	HS	< >
8/31/2010	0000320450	Ms. Jennifer...	\$2,000,000	\$2,000,000	<NULL>	MED	< >
2/28/2010	0000102225	Mrs. Vicki J...	\$2,000,000	\$2,000,000	<NULL>	MED	1
5/31/2010	0000121065	Mr. Jeffrey...	\$2,000,000	\$2,000,000	<NULL>	BUS	< >
8/31/2010	0000435276	Mr. Mathew...	\$1,500,000	\$1,500,000	<NULL>	THE	0
11/30/2009	0000100897	Ms. Ellen S...	\$1,100,000	\$1,100,000	\$1,100,000	HOS	< >
5/31/2010	0000005185	Ms. Eileen...	\$1,000,000	\$10,000,000	<NULL>	MED	0
8/31/2010	0000182457	Ms. Marger...	\$1,000,000	\$5,000,000	<NULL>	HS	< >
8/31/2010	0000006268	Ms. Kathy...	\$1,000,000	\$2,500,000	<NULL>	MED	< >
8/31/2010	0000189975	Ms. Kathy...	\$1,000,000	\$2,500,000	<NULL>	MED	0
8/31/2010	0000115438	Ms. Kathy...	\$1,000,000	\$2,200,000	<NULL>	MED	< >
8/31/2010	0000000782	Ms. Marger...	\$1,000,000	\$2,000,000	<NULL>	HS	< >
11/30/2009	0000221054	Mrs. Vicki J...	\$1,000,000	\$2,000,000	<NULL>	MED	0

Solicitation Status

Solicited in Annual Plan this FY	count(...)
OVERALL	1,268
In Annual Plan and Not Solicited	742
In Annual Plan and Solicited	117
Solicited and Not in Annual Plan	409

Solicitation Level

Solicitation Level	count(...)
OVERALL	1,268
<NULL>	10
1. \$500K+	104
2. \$100K - \$499K	192
3. \$25K - \$99K	236
4. <\$25K	726

FY Filter

(All) (None)

- 2006
- 2007
- 2008
- 2009
- 2010
- 2011
- 2012

Solicitation Status (#)

1. Total # Prospects Plan
2. Total # Followed Up
3. Ttl # Solicits outside Plan

Fiscal Year

Fiscal Year Stats

FISCAL_YEAR	# Pspcts(sum)	Total Followed Up in FY(sum)	Ttl Solic InFY(sum)	Act Solicit(sum)
OVERALL	859	117	\$205,000,437	\$116,732,019
2010	859	117	\$205,000,437	\$116,732,019



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Law School has a lot of proposals out . . .

Annual Goals Detail | Annual Goals Summary | **Proposals -- Active** | Proposals Portfolio View - Active | Visits - In Annual Plan | Proposals -- All | Visits - All

Proposals by Program

Count=178.00 (14.0%)
Selected=178.00 (100.0%)

Stats by Program // right click to export

Prog	# Pspcts(...)	In-Progr...	Ttl Expected(sum)	Ttl Solicit InFY(sum)	Act Solicit(sum)	Total Followed...
OVERALL	859	33	\$105,338,637	\$205,000,437	\$116,732,019	117
ULB	11	0	\$1,554,187	\$1,604,187	\$1,503,500	1
THE	95	7	\$4,767,500	\$5,072,500	\$1,761,866	6
MED	267	15	\$54,071,000	\$113,280,500	\$26,037,235	40
OX	40	0	\$3,381,000	\$5,114,500	\$5,505,500	4
PH	39	1	\$1,558,500	\$2,408,000	\$5,015,000	1
LAW	117	0	\$3,055,500	\$5,136,000	\$3,979,301	35
CAR	17	0	\$6,599,050	\$9,932,500	\$12,658,200	4
A+S	0	<NULL>	\$0	\$0	\$1,401,694	0
COL	90	4	\$6,210,000	\$12,145,250	\$12,846,773	9
HS	11	0	\$11,150,000	\$32,600,000	\$30,000,000	1
TUR	18	0	\$455,400	\$558,000	\$8,336,644	1

Proposals by Staff

Stats by Staff // right click to export

Staff	# Pspcts(s...	In-Progre...	Ttl Expected(sum)	Ttl Solicit InFY(sum)	Act Solicit(sum)	Total Followed...
OVERALL	859	33	\$105,338,637	\$205,000,437	\$116,732,019	117
Ms. Marcia Jane...	10	0	\$1,529,187	\$1,579,187	\$1,096,500	1
Ms. Mary Lou G...	36	0	\$1,986,200	\$2,236,200	\$521,773	1
Mrs. Susan M. H...	23	0	\$1,758,000	\$3,818,000	\$211,150	3
Mr. David R. W...	17	0	\$4,110,000	\$6,860,000	\$4,888,701	3
Mrs. Marvlyn E...	7	0	\$138,500	\$240,500	\$40,500	2
Mrs. Kathryn He...	37	1	\$558,500	\$1,398,000	\$5,000,000	1
Mrs. Susan Fitzg...	41	0	\$2,220,500	\$3,373,000	\$3,182,500	9
Mrs. Tammy Mo...	18	0	\$55,500	\$72,000	\$35,000	1
Ms. Heather Pha...	16	1	\$2,525,000	\$4,400,000	\$6,500,000	3
Mr. Jeff Prince	25	0	\$1,670,000	\$3,290,000	\$1,152,000	2
Miss Meghan R	0	<NTIT T>	\$0	\$0	\$1,000,000	0



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One development officer looks particularly strong.

Annual Goals Detail | Annual Goals Summary | Proposals -- Active | Proposals Portfolio View - Active | Visits - In Annual Plan | Proposals -- All | Visits - All

Proposals by Program

Stats by Program // right click to export

Prog	# Pspcts(...)	In-Progr...	Ttl Expected(sum)	Ttl Solicit InFY(sum)	Act Solicit(sum)	Total Followed...
OVERALL	37	0	\$720,500	\$1,643,500	\$663,600	20
LAW	37	0	\$720,500	\$1,643,500	\$663,600	20

Proposals by Staff

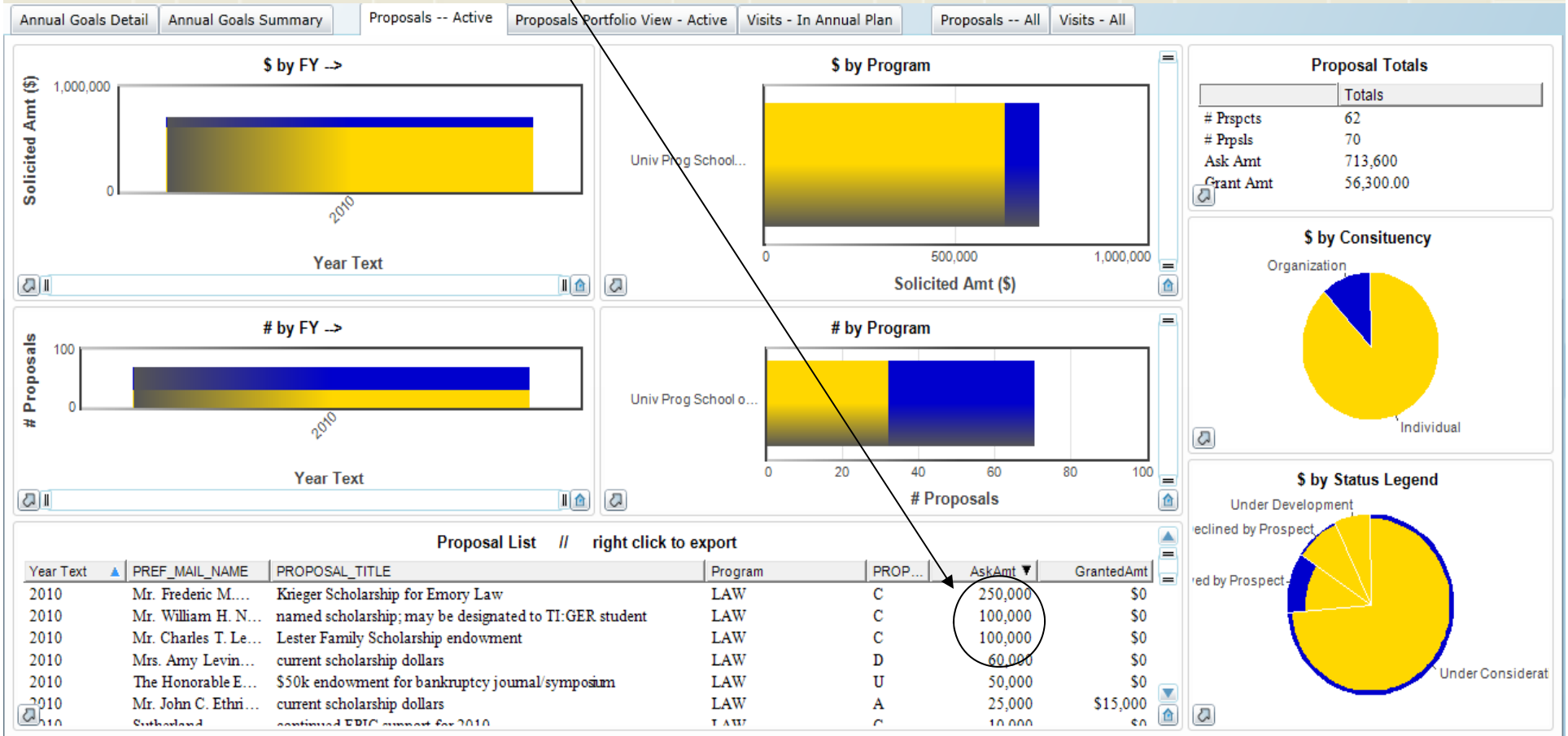
Stats by Staff // right click to export

Staff	# Pspcts(s...	In-Progre...	Ttl Expected(sum)	Ttl Solicit InFY(sum)	Act Solicit(sum)	Total Followed...
OVERALL	37	0	\$720,500	\$1,643,500	\$663,600	20
Dr. Alleen D. De...	37	0	\$720,500	\$1,643,500	\$663,600	20



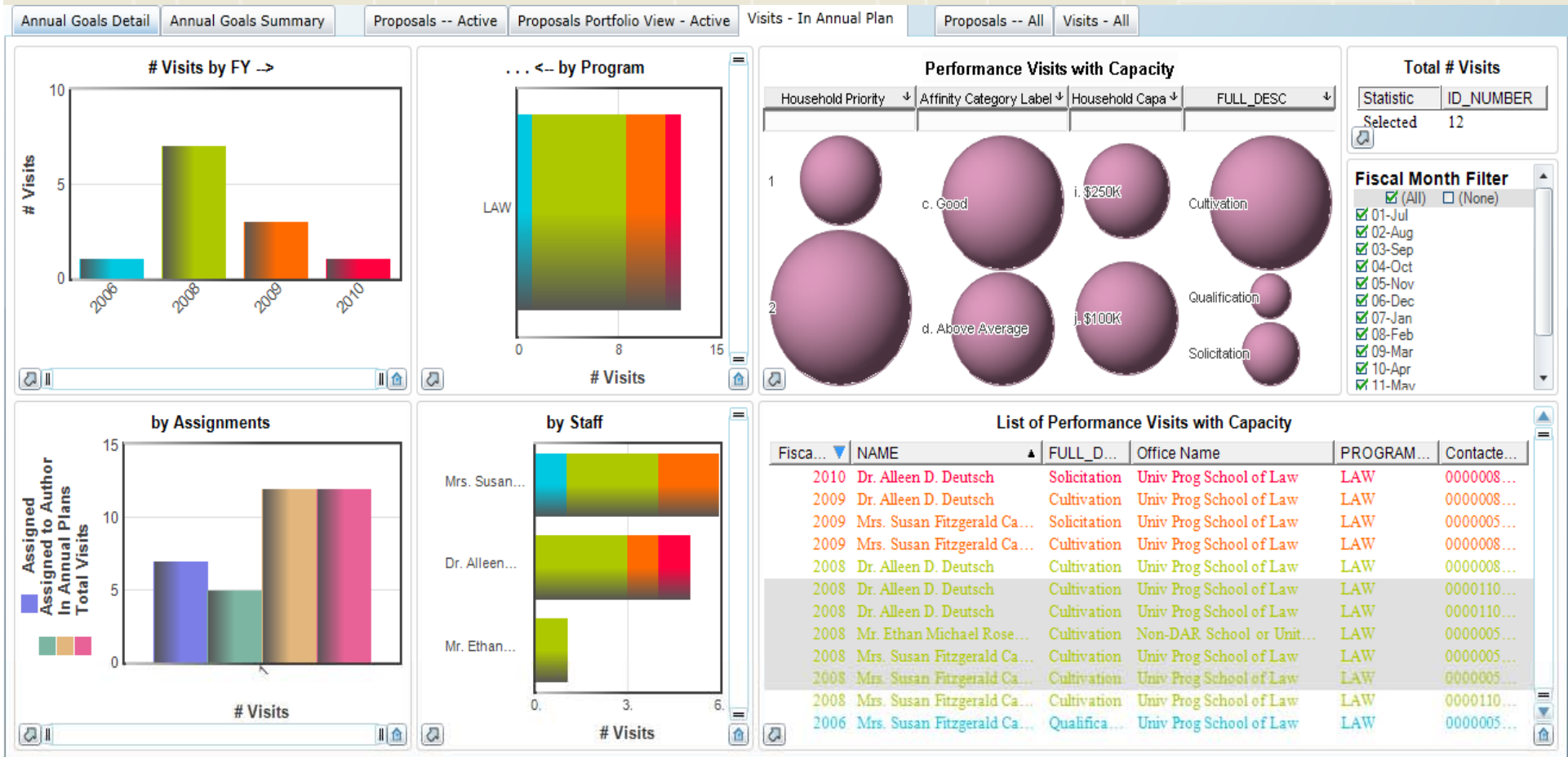
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However, only 3 large proposals, and 67 small ones – looks more like an annual fund plan!!



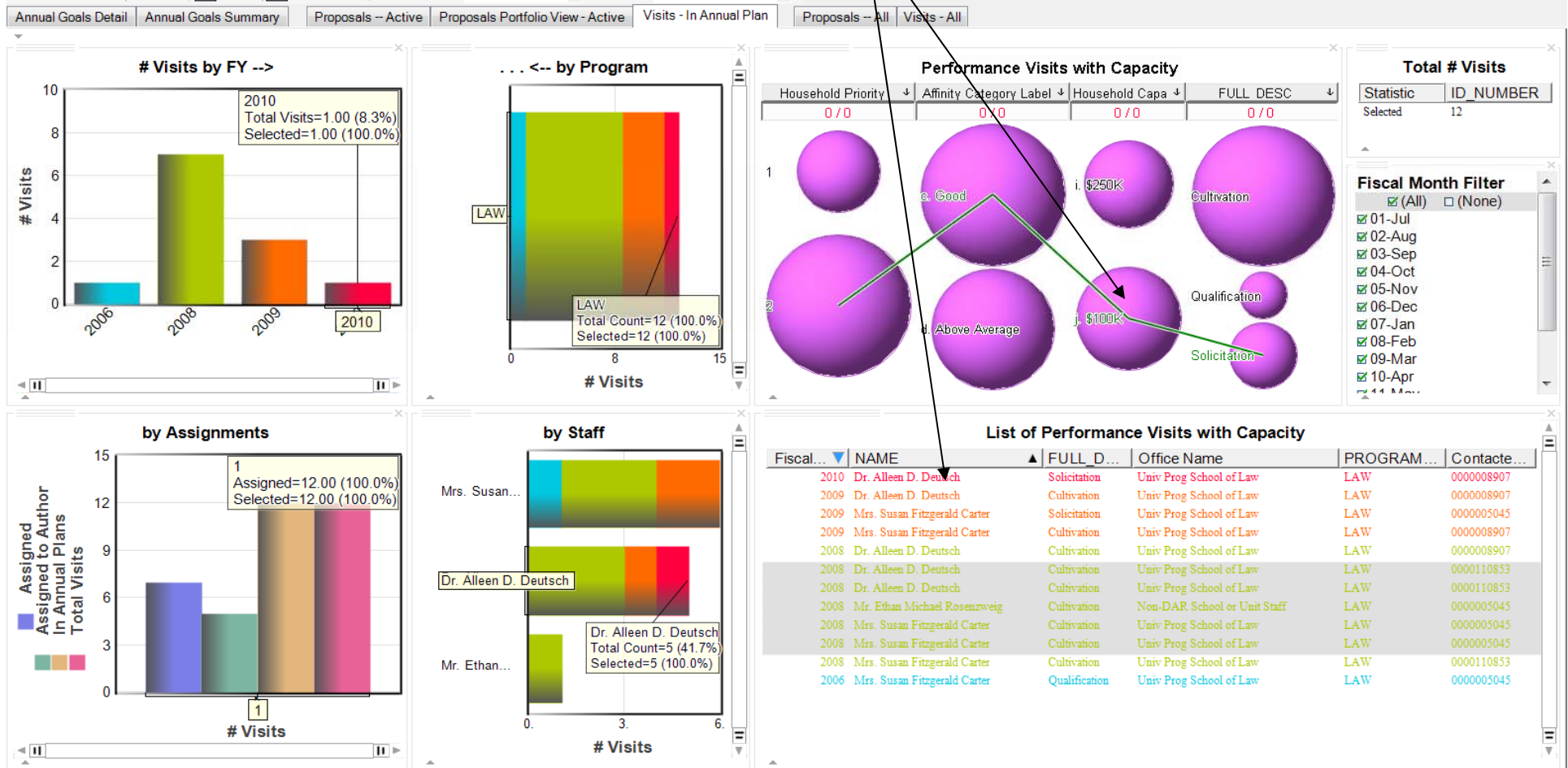
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As of February, only made 12 in person visits in past 4 years, and not with top targets.



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Example of recent visit with moderate target.



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Excellent discussion emanated from using this information in team review meeting.



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By the end of FY 2010.

Note: Solicitation Goals were met, mainly because of solicitations outside of annual plans. Our Annual Planning process needed to be revised.

Annual Goals Detail | Annual Goals Summary | Proposals -- Active | Proposals Portfolio View - Active | Visits - In Annual Plan | Proposals -- All | Visits - All

Solicitation Status (\$)

1. Total Planned Solicit
2. Actual Solicit
3. Ttl Amt Solicit outside Plan

Fiscal Year

Solicitations List // right click to export

EXPECTED...	PROSPECT_I...	Staff	Ttl Expected	Ttl Solic InFY	Act Solicit	Prog	In...
8/31/2010	0000100966	Ms. Marger...	\$5,000,000	\$5,000,000	\$30,000,000	HS	0
11/30/2009	0000126345	Mrs. Gail K...	\$5,000,000	\$5,000,000	\$12,000,000	CAR	0
2/28/2010	0000220904	Mrs. Vicki J...	\$2,750,000	\$2,750,000	<NULL>	MED	0
11/30/2009	0000493928	Mr. Bany...	\$2,500,000	\$5,000,000	<NULL>	MED	0
8/31/2010	0000410427	Ms. Marger...	\$2,000,000	\$5,000,000	<NULL>	HS	0
8/31/2010	0000320450	Ms. Jennifer...	\$2,000,000	\$2,000,000	<NULL>	MED	0
2/28/2010	0000102225	Mrs. Vicki J...	\$2,000,000	\$2,000,000	<NULL>	MED	1
5/31/2010	0000121065	Mr. Jeffrey...	\$2,000,000	\$2,000,000	<NULL>	BUS	0
8/31/2010	0000435276	Mr. Mathew...	\$1,500,000	\$1,500,000	<NULL>	THE	0
11/30/2009	0000100897	Ms. Ellen S...	\$1,100,000	\$1,100,000	\$1,100,000	HOS	0
5/31/2010	0000005185	Ms. Eileen...	\$1,000,000	\$10,000,000	<NULL>	MED	0
8/31/2010	0000182457	Ms. Marger...	\$1,000,000	\$5,000,000	<NULL>	HS	0
8/31/2010	0000006268	Ms. Kathy...	\$1,000,000	\$2,500,000	<NULL>	MED	0
8/31/2010	0000189975	Ms. Kathy...	\$1,000,000	\$2,500,000	<NULL>	MED	0
8/31/2010	0000115438	Ms. Kathy...	\$1,000,000	\$2,200,000	<NULL>	MED	0
8/31/2010	0000000782	Ms. Marger...	\$1,000,000	\$2,000,000	<NULL>	HS	0
1/30/2009	0000221054	Mrs. Vicki J...	\$1,000,000	\$2,000,000	<NULL>	MED	0

Solicitation Status

Solicited in Annual Plan this FY	count(...)
OVERALL	1,268
In Annual Plan and Not Solicited	742
In Annual Plan and Solicited	117
Solicited and Not in Annual Plan	409

Solicitation Status (#)

1. Total # Prospects Plan
2. Total # Followed Up
3. Ttl # Solicits outside Plan

Fiscal Year

Fiscal Year Stats

FISCAL_YEAR	# Pspcts(sum)	Total Followed Up in FY(sum)	Ttl Solic InFY(sum)	Act Solicit(sum)
OVERALL	859	117	\$205,000,437	\$116,732,019
2010	859	117	\$205,000,437	\$116,732,019

Solicitation Level

Solicitation Level	count(...)
OVERALL	1,268
<NULL>	10
1. \$500K+	104
2. \$100K - \$499K	192
3. \$25K - \$99K	236
4. <\$25K	726

FY Filter

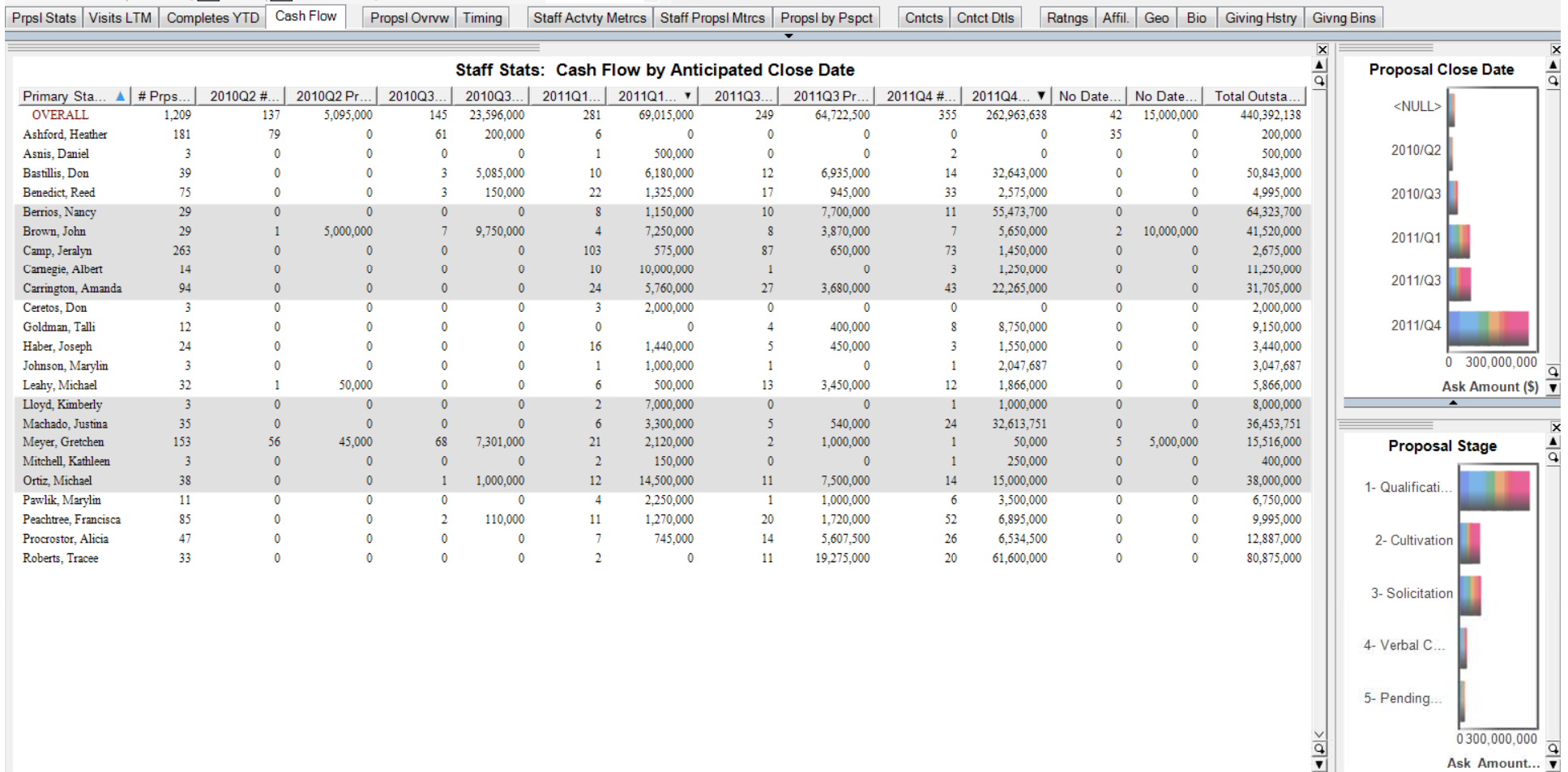
(All) (None)

- 2006
- 2007
- 2008
- 2009
- 2010
- 2011
- 2012



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Example of Campaign Cash Flow Summary shared at User Group by Dartmouth (disguised data)



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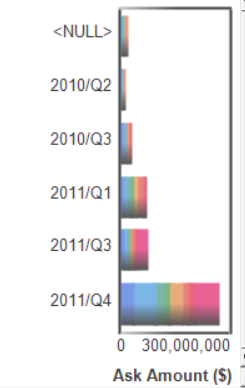
... by Proposal Stage (disguised data)

Prpals Stats | Visits LTM | Completes YTD | Cash Flow | Propsl Ovrvw | Timing | Staff Actvty Mtrcs | Staff Propsl Mtrcs | Propsl by Pspct | Cntcts | Cntct Dtls | Ratngs | Affil. | Geo | Bio | Giving Hstry | Giving Bins

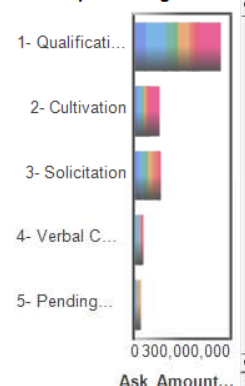
Staff Stats: Cash Flow by Proposal Stage

Primary Staff N...	# Prpals...	1- Qualification...	Stage 1 \$...	2- Cultivati...	Stage 2...	3- Solicitation...	Stage 3...	4- Verbal Commit...	Stage 4 \$...	5- Pending...	Stage 5 \$...	Total Ask Outs...
OVERALL	1,209	361	263,313,638	256	66,022,500	287	75,911,000	161	20,095,000	144	15,050,000	440,392,138
Ashford, Heather	181	0	0	0	0	9	0	77	200,000	95	0	200,000
Asnis, Daniel	3	2	0	0	0	1	500,000	0	0	0	0	500,000
Bastillis, Don	39	14	32,643,000	12	6,935,000	13	11,265,000	0	0	0	0	50,843,000
Benedict, Reed	75	33	2,575,000	18	995,000	24	1,425,000	0	0	0	0	4,995,000
Berrios, Nancy	29	11	55,473,700	11	7,725,000	7	1,125,000	0	0	0	0	64,323,700
Brown, John	29	8	5,900,000	7	3,620,000	4	7,250,000	8	14,750,000	2	10,000,000	41,520,000
Camp, Jeralyn	263	77	1,450,000	90	675,000	96	550,000	0	0	0	0	2,675,000
Carnegie, Albert	14	3	1,250,000	1	0	10	10,000,000	0	0	0	0	11,250,000
Carrington, Amanda	94	43	22,265,000	28	5,180,000	23	4,260,000	0	0	0	0	31,705,000
Ceretos, Don	3	0	0	0	0	3	2,000,000	0	0	0	0	2,000,000
Goldman, Tali	12	8	8,750,000	4	400,000	0	0	0	0	0	0	9,150,000
Haber, Joseph	24	3	1,550,000	5	450,000	16	1,440,000	0	0	0	0	3,440,000
Johnson, Marylin	3	1	2,047,687	1	0	1	1,000,000	0	0	0	0	3,047,687
Leahy, Michael	32	13	1,966,000	12	3,350,000	6	500,000	0	0	1	50,000	5,866,000
Lloyd, Kimberly	3	1	1,000,000	0	0	2	7,000,000	0	0	0	0	8,000,000
Machado, Justina	35	24	32,613,751	5	540,000	6	3,300,000	0	0	0	0	36,453,751
Meyer, Gretchen	153	1	50,000	2	1,000,000	30	4,431,000	74	5,035,000	46	5,000,000	15,516,000
Mitchell, Kathleen	3	1	250,000	0	0	2	150,000	0	0	0	0	400,000
Ortiz, Michael	38	14	15,000,000	12	7,500,000	12	15,500,000	0	0	0	0	38,000,000
Pawlik, Marylin	11	6	3,500,000	1	1,000,000	4	2,250,000	0	0	0	0	6,750,000
Peachtree, Francisca	85	52	6,895,000	21	1,720,000	10	1,270,000	2	110,000	0	0	9,995,000
Proctorstor, Alicia	47	26	6,534,500	15	5,657,500	6	695,000	0	0	0	0	12,887,000
Roberts, Tracee	33	20	61,600,000	11	19,275,000	2	0	0	0	0	0	80,875,000

Proposal Close Date



Proposal Stage



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